

Presented 11/10/15

Agreement Guidelines	1st quarter 2015 update	2nd Quarter 2015/1st Q FY '16 update	3rd Quart 2015 Update/ 2nd QFY'16
A. Employ an Executive Director and such other staff as the LCA deems necessary to provide development services for the City of Lincoln. This includes providing continuing education and ongoing learning opportunities for said staff.	See staff tab at the bottom for staff list of duties and how it pertains to the City and the funding agreement. Hake attended the Rural Development conference with Johnson in March. Hake applied for and received a grant to pay for training in October that will go towards the Community Economic Developer Certification.	See staff tab at the bottom for staff list of duties and how it pertains to the City and the funding agreement. Hake attended the Rural Development conference with Johnson in March. Hake applied for and received a grant to pay for training in October that will go towards the Community Economic Developer Certification.	Hake attended the Basic Economic Development Class in Naperville the second week in October. This week-long class is the first class required in the process to gain the CECD (Certified Economic Developer). Ameren sponsored Hake and paid for the class for her. Hake plans to take her second class as soon as the schedule is released for 2016.
B. Monitor and aid in the retention, expansion, and development of existing businesses as follows:	Working on setting up a program called Sycranist to help track and monitor retention and expansion. The program is multifacitated and will help staff with tracking. The program is costly so Hake is working with Ameren to get the program at a discounted rate or for free.	The Development Council (Greg Basford-chairman, David Lanterman, Seth Goodman, Julie Tarter, Keith Snyder, Clay Johnson, Damon Priddy- one open seat for City Council member) is currently working on a retention plan for the Alliance. This group meets monthly the second Thursday of the month.	The Retention plan has been approved and the site visit form and plan is included in this quarter's packet. We have identified 589 commercial properties in Lincoln. We are working on setting up yearly meetings with businesses with over 20 employees. A business of any size can request a meeting at anytime.
1. Work with the City to identify top priority businesses in Lincoln for phase one, phase two, and phase three site visit plans.	Sending Johnson a list of businesses in Lincoln to identified the top businesses to meet with. Will be to him by 4/17/15		The list retention list is still under development. Many of the commercial sites are under the property owner's name not the business owner name.
2. Visit and build relationships with existing businesses in Lincoln according to established priority plan.	Hake is working on scheduling meetings with her and Johnson with these businesses. Meetings will begin in late April.		The Development Council will set the priority list once the business list has more detail (contact name, number and number of employees)
3. Identify key areas of aid needed for key businesses. Work on a strong workforce development plan for local businesses.	The Alliance has been meeting with the largest businesses in Logan County since December and many of them site the same issues- Workforce development. We are working a plan for a program. to address this issue. Soon a meeting with key entities will happen to address this #1 issue our businesses are having. More information will come from future meetings.	The top issue for our large and small businesses is the lack of quality employees. We have formed a workforce development committee that is working on combining all the resources we have in Lincoln/Logan county to provide trainings and more importantly getting people to attend these trainings.	The committee has only met one time since my last report. The next meeting is Mid- November.
C. Serve as the downtown advocacy organization identified in the Downtown Redevelopment Plan's strategic plan.	A downtown committee is being formed under the development council and all businesses will be invited to participate in a meeting on April 28th at 2pm. This committee will serve as a sounding-board, offer education/trainings, advocacy, and be responsive to the special needs of downtown businesses. The topics for the first meeting will be the new events and how businesses can participate and engage in the events and address any possible issues prior to the events.	The committee is formed and meeting on at least a monthly basis. Their progress is reported in section G. Most of their focus is on recruiting tourist to the downtown, and promoting DT Lincoln Businesses. Their have been discussions about the top issues the downtown businesses are facing and much like our larger businesses, it is lack of quality employees. This is an issue the workforce development committee is working on. A representative from the downtown committee on the workforce committee for continuity.	The Downtown committee has been actively working on ideas for helping our downtown businesses. Not much is going on with the DT Redevelopment Plan at this point, but the Alliance will jump in once this kicks back in. Hake continues to serve on the TIF review committee for the City of Lincoln.

D. Work, in cooperation with the City, as a local liaison with the retail consultant, Retail Strategies, to help foster the recruitment of new retail businesses and the expansion of existing retail businesses through the plan and relationships that Retail Strategies has developed.	Hake is in direct contact with Lauren, Lincoln's representative with Retail Strategies. Hake has supplied RS with information regarding available space, and potential prospective businesses for Lincoln. Two new retail chains will open in the next couple month. One as a result of RS and other is something Hake worked on independently. Both announcements will be coming soon.	Hake stays in contact with Retail Strategies often to stay current on their progress. At this time they are only giving updates on a quarterly basis, which is different than when they originally started.	Retail Strategies just gave a fairly promising report in late October with one large national retail chain under contract, and at least one more looking to come here.
E. Advise and counsel private businesses on strategies designed to foster the best possible pro-business environment with the City.	Hake has consulted with two other individuals on potential start up retail type businesses	The Alliance is working with one in-home business on opening a store front, and a potential new business in Lincoln opening this fall. Hake is working with SCORE chapter from Springfield. There is a local rep who can and is willing to work with existing and new businesses on planning. The Alliance plans to offer some of the SCORE workshops. The Alliance is also planning their 2016 calendar with many other workshops to help small businesses.	The Alliance has offered several Lunch 'N Learns to help give small businesses training support they need at low or no cost. In October we hosted one on Customer service with 26 people in attendance, and we are offer a Google Seminar on November 18th at 7:30am and again at Noon. This event is no charge and will help businesses get on the web and the correct information about their business.
F. Promote the City as a location for business operations.	The Alliance is working on printing banners that will be hung in empty store front windows to promote downtown Lincoln as a place to locate a business. These banners will go up will by up before the first event in June. (draft of banner is in packet)	The banners are still hanging in the windows of store fronts and were up prior to the beginning of the festival season. The Alliance has secured radio advertising and will begin a campaign for the City of Lincoln as a place to start a business in September.	Each month a series of radio ads are played weekly. Some ads promote events, some focus on Logan County Tourism, so focus on the Logan County Alliance. For November one of the reoccurring ads is about starting a business in Lincoln. This ad we pay for highlights the advantages of starting a business and raising a family in Lincoln, IL.
G. Plan and implement promotional activities to help retain and protect businesses.	The Alliance took a group of employers to meet the Governor of IL on March 18th in Springfield. Taking another group on April 15th for a day-long employer action day. Governor will address the group and meetings are scheduled with law makers. Top issues that impacted businesses will be discussed.	The Downtown Business Committee (a committee of the Development Council) has been meeting and discussing ways to promote our downtown business. The top priority we are working on is the "Downtown Dollar Days" they is a concept similar to Kohl's Cash. Details are still being worked out on this project. The Alliance is planning the Annual Christmas Parade. Details will be sent to the Council and public soon. Shop Small Day is also being planned to promote holiday shopping locally.	The Alliance has planned again, Small Business Saturday. This year the Downtown promotional activity will be on Saturday, November 28th and to-date we have 15 downtown businesses committed to participate in "Shop Small", by the event we anticipate 18 to 20 businesses involved. The Alliance took on the planning of the Annual Christmas Parade, which will be held on Thursday, December 3rd at 6:30pm. The Alliance Holiday Open House will be held on Friday, December 4th from 4pm to 6pm. All city Council members and employees are invited. Just call the office to register for the parade and/or open house.
H. Assist the City Administrator in facilitating and executing a comprehensive economic development branding campaign targeting businesses to locate and grow in the City of Lincoln.	This is on hold until Council votes to move forward with development of the plan	Continues to be on hold until the City finishes process with DCC.	Continues to be on hold until the City finishes process with DCC.

I. Serve as an information source for those interested in economic development and provide relevant responses to all requests for economic development information.	As requests and questions come in we respond within 24 hours. Since Feb. 1st we've had 5 inquiries.	We've had three inquiries. One has evolved into a very promising new business starting this fall in our downtown. A couple relocating to Lincoln to start this business. I will pass along more details as it progresses.	We've had about four requests for sites/properties that have come in from DCEO, but nothing has come from the as of yet. We've had only three other inquiries. The old O'Donohue' building has sold. The new owners have some very exciting and new plans for the building. We will start to see some renovations soon. They plan to open mid to late 2016. As I'm allowed, I will pass along details of the new business.
J. Provide for the support and nurturing of businesses and the development of an entrepreneurial environment through cooperation with other local, county, state, and national economic development organizations.	Hake has met the director of DCEO, and workforce development staff at DCEO to establish relationships. Hake has a meeting scheduled with the Logan County Development Partnership on April 21st to start working on a partnership between the two organizations. Hake has met with the County Board chairman to also establish a working relationship with that entity. Other meetings: Ameren Economic Development staff , Peoria Regional Economic Development Director, Representative Tim Butler and his legislative aide. The Alliance joined IEDC (International Economic Development Council) the leader in the industry on education, leads and "best practices". Worked with Steve McClure from Opportunities Alliance, LLC to connect him with key employers for the work on the Enterprise Zone application. Hake is attending the IL Rail Association Summit on April 29th. With potential cuts in budget some communities services could be impacted. Hake will attend this event to find out more information.	Hake attended the presentation to Peoria Regional Economic Development with Clay Johnson on the 5th Street Rd project. Hake has spent a great deal of her time working with the Opportunity Alliance, LLC on the application process for the Enterprise Zone redesignation. Hake's responsibilities include for the moment securing support letters, and employee information (how many, where do they live).	Hake has met with SCORE representatives a few times. We are working on a partnership where the Alliance office would be the SCORE "office" for the Lincoln area and in turn they will help us offer small business trainings and business mentorships locally. As of right now Hake's work on the Enterprise Zone application is done. Opportunity Alliance has received approval from the City and County and are on track to have the application done by the December 31st deadline.
K. Provide a web page to be linked to the City and the LCA websites. The web page shall be updated and revamped continuously to provide the most current information concerning economic development in the City.	Hake and staff have undergone training for LOIS, with will go live this month on the www.LincolnIllinois.com site. LOIS will serve as a site location tool for commercial space and land. The new site will also house demographics of Lincoln including workforce stats and census information. GIS mapping can also be displayed on this site.	The Web page is ready to go, Hake is working on getting property details from owners and Realtors. This project is proving to be more challenging than Hake anticipated. The next step beginning in September Hake will meet/call owners realtors individually and gather the data herself verses trying to collect it as a group invite.	The employee that was trained on uploading data to the website has left the Alliance. So we are waiting for Location One to offer the next round of training to get more staff trained. Property owners are starting to contact the Alliance and give property details which will help the website be of greater value.
L. Monitor the development activities discussed and considered by the City through attendance at Committee of the Whole meetings and briefings with the City Administrator, other staff, and the Mayor	Hake has attended all COW meetings except one that she already had a school board commitment at the same time.	Hake or a member of the Alliance has attended at least one meeting a month. It is usually two, but given the reduced number of council meetings and the increased number of Alliance meetings in the summer it was more challenging to make every meeting.	Hake or a member of the Alliance has attended at least two meetings a month since the last reporting period.

M. Provide an in-person report to the City Council on development issues and the activities and services being provided pursuant to this Agreement by the LCA no less than once each calendar quarter.	Delivered on 4/14/15	Delivered on 9/8/15	Delivered on 11/10/15
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Draft Retention Plan Lincoln, Illinois

Purpose: City leaders and the Logan County Alliance acknowledge the importance of developing a tool that will enable the staff to establish ongoing business relationships with existing employers in the community. It is important to recognize that these employers have changing business conditions and threats that may jeopardize their continued presence in Lincoln. There are also expansion opportunities that may exist and both the City and Alliance believe that it is best to position ourselves to offer our services to influence their investment decisions in our favor. Thwarting the threat of existing employers closing their doors and working with them to encourage expansions in Lincoln will only happen if we make a sincere and aggressive effort to assist our employers.

Program Structure: The Alliance's retention/expansion program will be highly organized and ongoing.

Coordinator: President & CEO of the Logan County Alliance, Andi Hake will serve as the program coordinator and will be responsible for organizing and completing all activities.

Call Teams – We will use 2-person call teams for all calls made on the targeted employers. Three members of the Alliance staff/Board and five to seven volunteers will serve on the Retention/Expansion Team. The volunteers will be trained prior to making calls.

Employers – The Alliance has identified all local employers that will be visited. We will target all non-commercial, non-governmental employers with 20 or more employees. We will review our list annually and add or delete names, as appropriate. We currently have 589 employers on the list (see attachment for company names).

Frequency of Calls: Six call teams will be formed and assigned (X) employers each. Our goal is to call on all employers each year. On average, we will make four calls per month, although it will be up to the individual call teams to schedule their visits.

Call Results: The eSynchronist program will be utilized, including the questionnaire. Following each visit, the call team will meet with the Coordinator and discuss the results of the call. If follow-up action is appropriate, the Coordinator will make arrangements for a second visit. The Coordinator will also be responsible for entering the results in the eSynchronist database.

Follow-up: If a retention threat or expansion opportunity is uncovered during the visit, the Coordinator will be responsible for coordinating follow-up actions. The response will reflect and address the nature of the issue. City, State, utility, rail, financing, workforce and training are examples of issues that may arise during the visits and require follow-up responses. The Coordinator will contact all appropriate topic-specific representatives and make arrangements for the follow-up visit.

Workshops: For businesses with fewer than 20 employees the Alliance will offer workshops to collect data and offer resources twice yearly to be schedule by the program coordinator with the development council. Any employer of any size can request a retention visit at any time from the Alliance.

The City of Lincoln and the Logan County Alliance are committed to assisting existing employers in any way possible. We believe that the above program will enable us to maximize local development opportunities by investing our most valuable local resources, our local employers.

ON-SITE VISIT FORM

To be filled out by the interviewer — Information is confidential

11.12.15

Company Information	
Company Name	Date of Visit (mm/dd/yy)
Contact Name	City/State/ZIP
Phone () -	
Product/Service/Market	
1. Describe what you do. What products/services do you offer? _____ _____	
2. What is your percent of growth over the last eight years? _____	
3. Are new products/services anticipated in the next two to three years <input type="checkbox"/> Yes <input type="checkbox"/> No	
4. Is the company's primary market: <input type="checkbox"/> Local <input type="checkbox"/> Regional <input type="checkbox"/> National <input type="checkbox"/> International	
5. Are there suppliers or service providers that the company would like to have located closer to this facility: <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, product/service, company, and current location? _____	
6. Does the company plan to expand in Lincoln or elsewhere in the next five years: <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, estimated total investment \$ _____ Approximate percentage equipment/technology _____ % Estimated number of jobs added or lost (-) _____ Estimated facility size increase _____ sq. ft. Comments: _____ _____	
7. Does the company import or export: <input type="checkbox"/> Yes <input type="checkbox"/> No Where are your export markets? _____	
8. Who are your primary competitors, and where are they located (City and Country)? _____	

ON-SITE VISIT FORM

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To be filled out by the interviewer — Information is confidential

11.12.15

Barriers

9. Does the company have concerns with Lincoln, IL (infrastructure)?

Roads _____

Technology _____

Utilities _____

Sewer _____

Water _____

Other _____

10. Do you anticipate any federal, state, or local legislation changes that will **adversely affect** your business in the next five years:

☐ Yes ☐ No

If yes, what changes? _____

How will they affect the company? _____

11. Do you anticipate any federal, state, or local legislation changes that will **benefit** your business in the next five years:

☐ Yes ☐ No

If yes, what changes? _____

How will they affect the company? _____

12. What are the community's **strengths** as a place to do business?

13. What are the community's **weaknesses** as a place to do business?

14. Are there any **barriers to growth** in this community?

☐ Yes ☐ No

If yes, what? _____

Management

15. What is the company's ownership/management structure:

ON-SITE VISIT FORM

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To be filled out by the interviewer — Information is confidential

11.12.15

Workforce									
	Low	1	2	3	4	5	6	7	High
16. How do you rate the availability of workers in this area:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
17. How do you rate the quality of workforce in this area:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
18. How do you rate the stability of workforce in this area:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
19. What is the employee count for the company? _____ Is that low or average for the last eight years? _____									
20. The company's breakdown of where employees live and commute from.									
Mason County _____ % or # Logan County _____ % or # Sangamon County _____ % or #									
McLean County _____ % or # DeWitt County _____ % or # Macon County _____ % or #									
Others _____									
21. Are primary recruitment problems limited to: <input type="checkbox"/> Community <input type="checkbox"/> Industry									
22. What is the company's employee turnover rate: _____									

Workforce Notes:

Technology	
23. Has your reliance on technology increased over the last eight years?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Explain what was: _____	
24. Is the community's technology infrastructure adequate for your company's growth plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Comments: _____	

Technology Notes

Do you have any other comments you would like to share?

Discription	YTD 4/15	YTD 9/8/15	YTD 11/15	Budget ending 4/16
Administrative	3,220.36	8,217.25	8,217.25	32,869.02
WEBSITE	83.80	1,500.00		2,000.00
CONFERENCES & EDUCATION	715.00	0.00	535.00	3,000.00
MEMBERSHIP FEE (Chamber & IEDC)	745.00	0.00		745.00
Sponsorships (Balloon Festival)	0	5,000.00		5,000.00
Workforce Development		0.00		5,000.00
Christmas Parade			1,500.00	1,500.00
Promotion and Advertising		0.00		10,390.18
TOTAL	4,764.16	14,717.25	10,252.25	60,504.20